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MARXIST THEORETICAL AND METHODOLOGICAL APPROACH AND ORIENTATION IN THE SOCIOLOGY OF EDUCATION

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Abstract. *The paper first states that there are two dominant theoretical-methodological approaches and orientations in the sociology of education, namely, the functionalist and the Marxist ones. It also states that nowadays papers with other orientations are more often to be found, including the structuralist, the existentialist, the interactionist, the liberalist, the ethno-methodological, the analytical, and others. The introduction briefly gives an explanation while, at the same time, it makes a distinction between the theoretical orientations and the methodological approaches. The core of the paper gives, in summary, an explanation of six elements of the Marxist theoretical-methodological approach and orientation or of the historical-dialectical materialism, as this teaching came to be called in philosophy and science. The initial framework implies the assumption that education is socially-conditioned and that it has a class character in the class society. Further, the teaching about man and his nature, stating that he is a creative, active and practical being, is presented together with the teaching about the humanist character of education. Finally, the teaching about the importance of education for the reproduction of a particular socio-economic system as well as the reproduction of its respective ideology is stressed.*

Key words: *education, sociology of education, theoretical-methodological approach and orientation, dialectical-materialist teaching, humanism, class character of education, reproduction of the social system*

I

1. The basic tendency in modern educational science, especially in the sociology of education, implies that there are two dominant theoretical-methodological approaches and orientations in use, namely, the Marxist one and the functionalist one, both in the

theoretical field and in the empirical research. It should, however, be noted that more and more papers are to be found that are not sharing the above-mentioned approaches and orientations and that are of different bearings, such as the structuralist, the existentialist, the interactionist, the liberalist, the ethno-methodological, the analytical and others. Still, it cannot be argued that all of those dealing with that special branch of sociology share, equally and entirely, only one of the above-listed approaches or that they apply them in the same way; rather, it can be said that each of them, in its authentic way, contributes to the study of education. Various theoretical orientations and approaches of particular authors can be explained as arising from the circumstances in which they tend to find themselves as well as from different levels of the educational sociology development.

2. All the above-stated approaches and orientations are used in the general sociology as well as in most of special sociologies. That is exactly why some sociologists stress that the theoretical-methodological orientation in the sociology of education mainly depends upon the current state of the general sociology. Therefore, no special and authentic theoretical-methodological approach has been developed in the sociology of education, at least not to the point of being widely accepted thanks to its coherent structure. The same stands for the general and special methods or even their techniques and instruments. The educational sociology methodology does not differ from the general sociology methodology. Of course, the sociology of education is not assumed to be able to use absolutely all that has been used in the general sociology and other special sociologies. Some theoretical-methodological approaches and orientations as well as other methodological tools are more suitable and fruitful for the study of education, while others are almost not useable at all; thus, they are not in use.

3. The two dominant theoretical-methodological approaches and orientations have already been mentioned as well as several others that are more often met in the study of education; that is why it is proper to emphasize what is meant by the "scientific approaches" as well as by the "theoretical orientations." As stated by the sociologist Mihailo Popović, the *scientific approach* is an intellectual standpoint of observation and analysis that provides a view of a particular field of the scientific problems that are separated from all others for the sake of theoretical explanation. The *theoretical orientation*, on the other hand, is a determined and more or less correlated set of general principles used for explaining elements and relations within a particular field of the theoretical observation.¹ The approach to the sociology of education is synthetic; thus, education is viewed with respect to concrete socio-historical circumstances.

II

1. Before proceeding to an explanation of the given elements, it is important to note that the classics of Marxism, namely, Marx and Engels, did not create any separate theory of education. By developing their dialectical-materialistic teaching, and, within it, a special philosophical teaching as well as a theory of society, they necessarily had to deal with the issues related to education and schooling. Therefore, their ideas about education

¹ Popović, M. 1974 *Problemi društvene strukture*. Belgrade: BIGZ, p.21.

are found present in almost all of their works, stated on various occasions and in different contexts. Their common or individual works in which they presented their thoughts about education and schooling are the following: *The Capital*, *The Critique of the Gothic Program*, *The Economic-Philosophical Manuscripts*, *The Communist Manifesto*, *The Theses on Feuerbach*, *The Revolution and the Counterrevolution in Germany*, *The Position of the Working Class in Germany*, *The German Ideology*, *The Instructions for the Delegates of the Temporary Central Council of the International Worker Organizations* and *Anti-Duhring*. Many theorists of the Marxist orientation have interpreted the ideas found in the above-listed works in addition to explaining and building upon them. Among the first ones who commented upon them was V. I. Lenin in his works *Pearls of the Popular Projection*, *A Letter to the Attendants of the Capri Party School* and some others.

2. The connoisseurs of Marxism, both the ones who accept and promote it as well as those who refute and discard it do not agree upon the basic assumptions of the teaching regarding its theoretical orientation and its methodological approach. Still, they seem to adhere most consistently to the historical-dialectical materialism - as the teaching is sometimes called - if particular elements of the theoretical orientation and of the methodological approach, namely, the elements making up the whole are abstracted. Most of them are also used in studying other social phenomena. There is a great number of these elements.

(1) In the sociological research and study of the phenomena in education the general laws and principles of the dialectical and historical materialism should be applied.

(2) The starting assumption should be that education has an enormous, almost infinite power.

(3) In the sociological study of the educational phenomena the laws of the development of education in its historical perspective should be kept in mind.

(4) The starting assumption should be that education is socially-conditioned and that it has a class character in the class society.

(5) What should also be kept in mind is the teaching about man and his nature implying that he is a creative, active and practical being.

(6) The principle of the unity of education and labor should be adhered to.

(7) The initial framework is the teaching about humanist and emancipating character of education with a special emphasis on the alienation theory.

(8) Finally, any study of education should take into consideration its importance for the reproduction of a particular socio-economic system as well as of its respective ideology.

III

(1) In its study of education the Marxist approach and orientation first imply adherence to the general laws and principles of the dialectical and historical materialism, namely, those that are valid in any study of social phenomena in general.

In the methodological sense, we should first separate two essential positions held by the classics of Marxism, one of them being *analytical*, while the other is *critical*.² The first one is visible both in the theoretical contributions and in the practical research of social phenomena. The other one shows that the classics of Marxism were scientists who belonged to a particular and historically-determined society.

As for *dialectical laws*, they imply the law of the transition from quantity to quality, the law of the unity and the struggle between the contradictions, the law of the unity of the general, the special and the particular, and others. The *principles* of the dialectical and historical materialism are numerous. (1) The principle of the world's materiality - education as a process is determined by the material production process and by the human production process, (2) the principle of development, implying that phenomena in education are not static, but developmental and therefore, they should be approached in this way, (3) the principle of concreteness, implying that in the research of education, concrete socio-historical conditions should be taken into consideration, (4) the principle of objectivity implying that in the study of education the phenomena themselves should be the ones to start with, namely, the phenomena as they objectively exist, (5) the principle of all-inclusiveness implying that in the study of the educational phenomena all of their essential features should be determined, (6) the principle of determinism implying that the study of education should start from the fact that the educational phenomena are causally determined while determinism is flexibly understood.

(2) Marx and later Marxists have attributed an enormous, almost infinite power to education. Thus, education, together with science, has an enormous power or, rather, an almost infinite power in developing human potentials and thus, in the development of the society as a whole. Namely, its role is great both in the sense of developing objective potentials, expressed in the form of the developed material forces of the society - springing from human creativity - and in the sense of developing subjective potentials expressed in its liberating function or in its preparation of man for submission. In his *Instructions for the Delegates of the Temporary Central Council of the International Worker Organizations*, namely, the work considered by many as the one in which Marx most completely expressed his views of education, he writes: "Education implies three things. First: spiritual education. Second: physical transformation. Third: technical education that gives general scientific principles of all the production processes while at the same time it initiates a young human being by teaching him how to use practically and how to control the most basic means of all branches of labor."³ Many subsequent interpreters of these views have regarded them as Marx's concept of a comprehensively developed personality, while, in fact, it is Marx's understanding of the essence of education.

(3) The application of the dialectical-materialist laws and principles, as well as of other assumptions, in the study of the educational phenomena provides for determining

² Cifrić, I. 1984 *Klasno društvo i obrazovanje. Marksova i Engelsova kritika obrazovanja u građanskom društvu*. Zagreb: Školska knjiga, p. 65.

³ Marks, K. 1973 "Instrukcije delegatima privremenog centralnog saveta", *O omladini*. Belgrade: Mladost, p. 77.

the laws of development in this domain by associating it with the wholeness of the society, most of all, with the production forces and relations. Such an approach in the Marxist teaching is regarded as historical; it is of great significance.

(4) Education is socio-economically conditioned and it has a class character in the class society.

Marx and Engels, as well as Lenin later on, stressed that education is exceptionally socially-conditioned; thus they expressed an eminent sociological understanding of this social phenomenon. It is so socially-conditioned that it has a class character in the class society. Marx and Engels explicitly said so in their *Manifesto of the Communist Party*. "And isn't your very education also socially-conditioned? That is, isn't it conditioned by the social circumstances in which you are the ones who educate through a direct or indirect intervention of the society by means of the school, etc. The communists do not invent the impact of the society upon education: they only change its character..."⁴

In the relationships between education and production or between the educational system and the production ones, there is an obvious contradiction that is of class character. The essence of the class character was, in that sense, explained by Lenin. He wrote that the essence "lies in the fact that education is equally organized and equally accessible to all the wealthy ones. The very last expression contains the essence of the class school." Further on, he went on to say that "the class school knows of no rank, it only knows of citizens. It requests that its students should do only one thing: they should pay for their education. The class school absolutely needs no different programs for the rich and the poor since the latter ones have no means of paying for the school fee... throughout their schooling - the class school does not provide for an entry into high education. The class school does not assume class closeness at all; on the contrary, unlike the ranks, the classes always leave a completely free entrance for particular persons to pass from one class into another. The class school is not closed for anyone who can possess means of learning."⁵

The source of the society's class character is in the sphere of labor and production; that is why Lenin attempted to define classes in that sense: "Classes are large groups of people different with respect to the position they occupy in a historically determined system of the social production, as well as to their relation... to the means of production, in addition to the role they play in the social organization of labor and, consequently, the way of obtaining their share of the social wealth as well as regarding the amount of it they have at their disposal."⁶

In view of this teaching, it is wrong to assume that the source of the social classes is in the sphere of education. Regarding an increased importance of education in modern world, this attitude should be questioned; moreover, the question concerning its role in reproducing the class society should be raised. In the conditions when education cannot be associated, in a different and more immediate way, with the process of the material labor reproduction, it is increasingly becoming the very source of the social inequality

⁴ Marks, K. i Engels, F. 1975 *Komunistički manifest*. Zagreb: August Cesarec, p. 58.

⁵ Lenjin, V.I. 1960 *O komunističkom vaspitanju i školi*. Sarajevo: Veselin Masleša, p.32.

⁶ Lenjin, V.I. 1961 *Velika inicijativa*. Belgrade: Kultura, p. 86-87.

reproduction including the class structure of society. However, following the attitude of the Marxist classics, education is *eo ipso* serving to provide for an individual, as well as for the whole class, the knowledge of one's own conditions of living and work. That is why they consistently stressed the need for education.

(5) In the Marxist teaching, man is a working, active, creative and practical being.

Man is primarily a natural being or a biological individual as an organic, inherent part of the world and of nature; thus, he is subdued to its laws. Man is also a psychic being; thus, he is a working, active, creative and conscious being. He is a being of the need as well as a developing being. At the same time, he is a social being since whatever human is in him - that is, whatever makes him a man - is, in fact, a result of the social evolution. What is, for him as a social being, *differentia specifica* is labor understood as a practical human activity.

The human personality as a result of the long lasting evolution and social influences is characterized by its integrity, particularity and relative consistency of its behavior. It is, at the same time, as specially stressed by V. Milanović⁷, a relatively firm and lasting organization of the character, temperament, intellect and physical construction that determines his adoption to the environment, but it is also a dynamic organization of the attributes and characteristics being transformed.

Marx wrote that man is a being of labor, that he is a *homo praxis*. Labor is the basic way of man's relation towards nature, towards the external world; it is the root and the essence of the human generic being. The object of labor is the materialization of the man's working life; while realizing himself in labor, by transforming nature, by creating the new in the surrounding material world, man, at the same time, transforms himself by creating a new self. It is by labor, by his practical engagement that man produces not only himself but the human species; he develops generic attributes of his own species and becomes more and more universal thus turning himself into a total being. This totality is twofold: it refers to his human kind, generically, and to his own self, individually; that is why this totality is found in the dialectical unity.

(6) The principle of the unity of labor and education in Marx's and Marxist teaching is explicitly stressed. It implies that education should be so structured, organized and flexibly established that (a) it can follow the development of production and satisfy its needs and that (b) it can only directly contribute to advancement and increase of production potentials. It is *the unity of education and labor* expressed as the *unity of labor*. Education should correspond to the development of society and industry; it should technologically stimulate it as well as socially anticipate scientific assumptions for the future and a much faster development of the society.

(7) The humanist and emancipating character of education in the Marxist teaching can first be grasped from the above-mentioned views of man and his nature, from the interpretation of the relation between man and society as well as from the understanding of the essence of education.

The interpretation of the relationship between man and society is closely connected to

⁷ Milanović, V. 1976 "Sociologija ličnosti". *Osnovi nauke o društvu*. Belgrade: Rad, p. 415.

the alienation theory having an important place not only in Marx's own thoughts, but also in the Marxist thought in general. It is the absence of an appropriate relationship between man and society that represents one of the basic forms of alienation. It is rather a particular social state (ways of production, class relations, political system) that, according to S. Flere, prevents man from realizing the potentials of his personality or the characteristics immanent to him that make up his generic nature.⁸

In the sociology of education the alienation theory is important as an orientation in determining social possibilities for a comprehensive development of a personality, especially through education. This theory, as stressed by S. Flere, provides for an analysis of the aspects of the disabling or fragmenting of the man's personality as well as of the factors that support the process, in addition to determining an objective possibility of overcoming this state.⁹

Education as a form of spiritual production should and can provide for the prerequisites for the *general human emancipation*. These assumptions aim at realizing the enlightenment functions of education, that is, at knowing and viewing social conditions as concrete forces and prerequisites for the human liberation. Likewise, education, primarily due to its humanism, contributes and should contribute to the building-up of a comprehensive and free personality.

(8) Education is an important medium of the reproduction of a particular (existing) socio-economic system as well as of its ideological system.

According to the Marxist teaching, the educational system as a part of the social superstructure is conditioned by its economic base. Such an assumption shows that the working force reproduction implies at least two kinds of reproduction, namely, the reproduction of the skills needed and indispensable for the working force and the reproduction of the ruling class ideology.¹⁰

The former reproduction is related to the relationship between education and production. This relation is contradictory; it immediately assumes an association as well as a radical separation of these two social spheres. First of all, education is directed towards the production itself for which it must provide both the physical work force as well as the intellectuals needed for a continuous production process. I. Cifrić explains that it is the production which imposes such an association so that education or, to put it simply, school, must be permanently ready for its own professional and social adaptability to the production process and its establishment.¹¹ On the other hand, the class character of education as well as its class function are based upon a radical separation of education from production. I. Cifrić would not prefer to regard it as a mere separation; rather, he considers it as a genuine separation of the two spheres of social activity as a consequence of the social division of labor in the society.¹² This separation has caused the production to become a practical activity whereas education (as a spiritual production) has become a theoretical activity. Both the activities develop and act almost independently and

⁸ Flere, S. 1976 *Obrazovanje u društvu. Uvod u sociologiji vaspitanja i obrazovanja*. Niš: Gradina, p.37.

⁹ Ibid., p. 39.

¹⁰ Koković, D. *Sociologija obrazovanja*. Op. cit., p. 89.

¹¹ Cifrić, I. *Klasno društvo i obrazovanje...*, Op.cit., p. 40.

¹² Ibid.

following their own particular logic as two special social activities. However, production and education (education as labor) are mutually conditioned; they do not go without each other. In the conditions of the social division of labor, they supplement each other; they condition as well as provide for each other. Production provides the means of the material conditions for the development of education, while education provides for production work force.

The second form of reproduction refers to ideology. The contemporary sociologists of the Marxist orientation, in the conditions of modern society, see education as a powerful weapon by which a desired ideology is being accepted. Thus, in the domain of ideology, education appears as a means of reproducing the existing or desired system. The starting point is Marx's teaching assuming that in every epoch the most dominant ideas are those of the ruling class. Regarding the fact that the ruling class is an organizer and (through the society) a controller of the educational system, such ideas are consistently, systematically and necessarily built-in in the domain of education.

Louis Althusser is surely one of the most distinguished theorist of the Western world, namely, the one who has studied the relationship between education and ideology. He states that the school apparatus has turned into the state ideological apparatus number one. Nowadays the school has replaced the church in its role of the *leading ideological apparatus of the state*. It is associated with the family as the church used to be. Thus, it can be confirmed that the crisis, more profound than ever - that has caused disturbances in the school systems of many states - is often related to the crisis (anticipated as early as in the *Manifesto*) that disrupts the family and that has taken on a political meaning; in the same way, the opinion seems acceptable that the school (as well as the binary relation between the school and the family) represents an ideological apparatus of the state currently in power, namely, the apparatus having a decisive role in the social relation reproduction.¹³

MARKSISTIČKI TEORIJSKO-METODOLOŠKI PRISTUP I ORIJENTACIJA U SOCIOLOGIJI OBRAZOVANJA

Miomir Ivković

U radu se najpre navodi da u sociologiji obrazovanja preovlađuju dva teorijsko-metodološka pristupa i orijentacije: funkcionalistički i marksistički. Takođe se navodi da se sve češće nailazi i na radove koji su drugačije provenijencije, kakve su: strukturalistička, egzistencijalistička, interakcionistička, liberalistička, etnometodološka, analitička i još neke. U uvodu se ukratko objašnjavaju i razlikuju i teorijske orijentacije i metodološki pristupi. U centralnom delu rada u osnovnim potezima objašnjavaju se šest elemenata marksističkog teorijsko-metodološkog pristupa i orijentacije, ili istorijsko-dijalektičkog materijalizma, kako se ovo učenje inače zove u filozofiji i nauci. Polazni okvir je postulat da je obrazovanje društveno uslovljeno i da u klasnom društvu ima klasni karakter. Nadalje, učenje o čoveku i njegovoj prirodi

¹³ Althusser, L. 1986 "Ideologija i ideološki aparati države." *Proturječja suvremenog obrazovanja* (S.Flere). Zagreb: RZ RKSSO, p.137-138.

po kome je on stvaralačko, aktivno i praktičko biće i, povezano s tim, učenje o humanističkom karakteru obrazovanja. Potom, učenje o značaju obrazovanja za reprodukciju određenog društveno-ekonomskog sistema i reprodukciju odgovarajuće ideologije, i drugo.

Ključne reči: *obrazovanje, sociologija obrazovanja, teorijsko-metodološki pristup i orijentacija, dijalektičko-materijalističko učenje, humanizam, klasni karakter obrazovanja, reprodukcija socijalnog sistema*